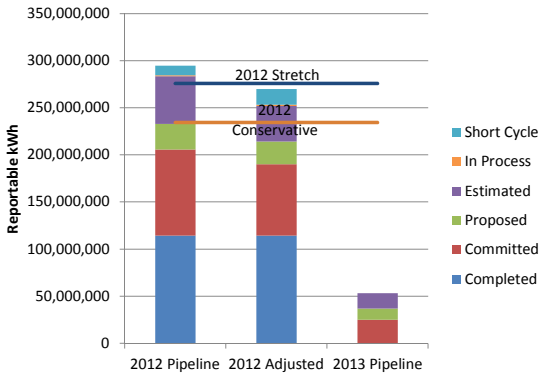
Efficiency Summary with Market Transformation October 1, 2012

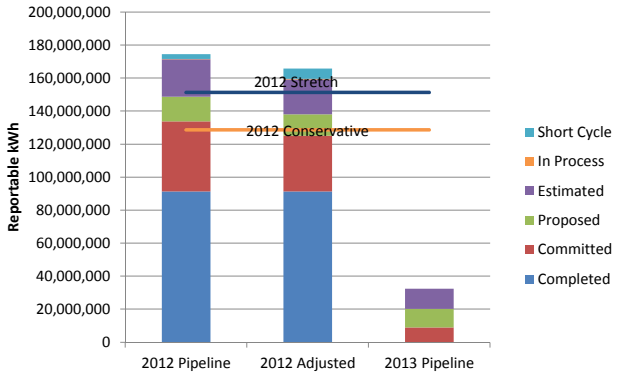
Combined Efficiency		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	114,571,898	91,496,323	2,259,929	170,574
	To date % of Conservative goal	49%	71%	48%	43%
	To date % of stretch goal	42%	60%	41%	37%
Context	Historical % of actual accomplishment	53%	47%	53%	37%
Budget	To Date % of Incentive Budget Spent	39%	48%	49%	29%

Data included in this dashboard are preliminary and represent the best available data at this time. Energy Trust annual and quarterly reports to the Oregon Public Utility Commission contain the official Energy Trust data. All OPUC reports are published online at www.energytrust.org.

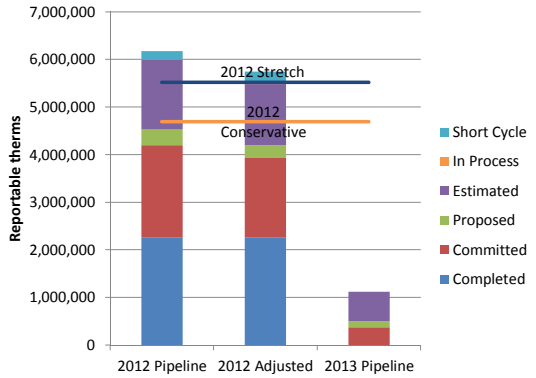
PGE Savings Pipeline 2012-2013



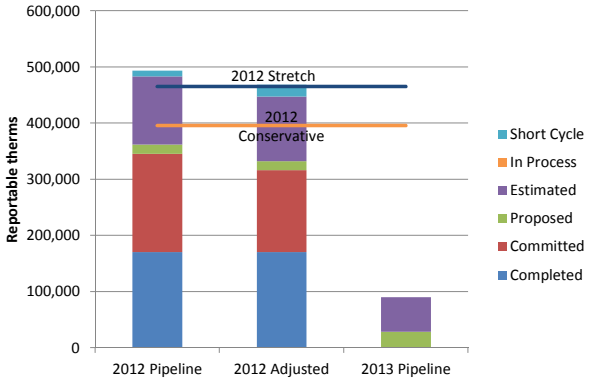
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



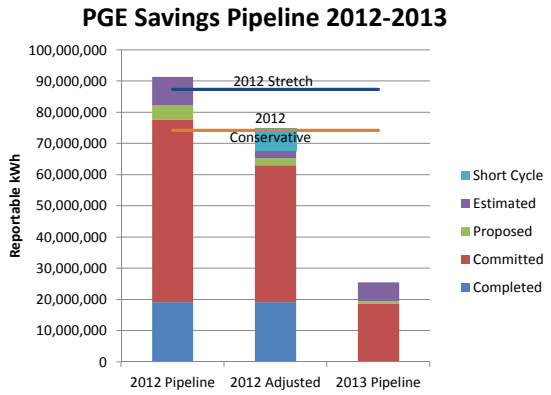
2012 Adjusted Pipeline percent of Stretch Goal	
PGE: 97.55%	**PAC:** 109.41%
NWN: 103.88%	**CNG:** 100.72%

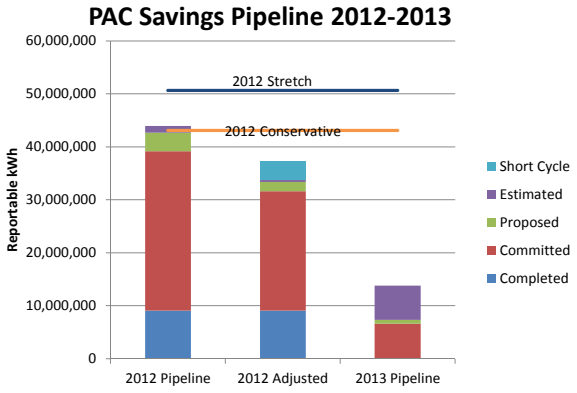
Industrial Summary

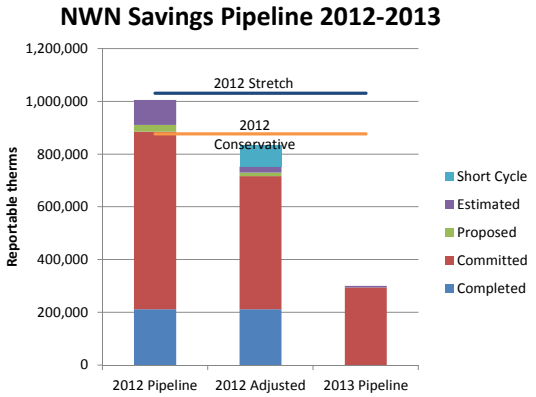
October 1, 2012

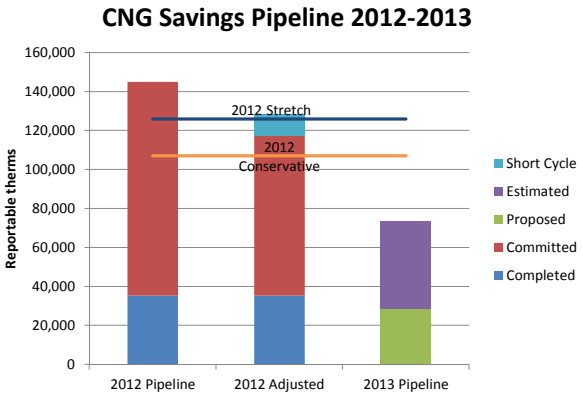
Program: Industrial		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	19,171,791	9,081,986	212,195	35,287
	To date % of Conservative goal	26%	21%	24%	33%
	To date % of stretch goal	22%	18%	21%	28%
Context	Historical % of actual accomplishment	40%	29%	39%	22%
Budget	To Date % of Incentive Budget Spent	31%	25%	13%	12%

Data included in this dashboard are preliminary and represent the best available data at this time. Energy Trust annual and quarterly reports to the Oregon Public Utility Commission contain the official Energy Trust data. All OPUC reports are published online at www.energytrust.org.









2012 Adjusted Pipeline percent of Stretch Goal	
PGE: 86%	**PAC:** 73%
NWN: 81%	**CNG:** 102%

Program Activity

Activity	2012	2011
Studies Assigned	49	107
Studies Approved	61	100
Offers Signed	279	266
Offers Counter-Signed	183	234
Project Completed	567	524

Special Considerations:

Overall:

- The program appears to be on track to meet or exceed Conservative goals in PGE and CNG territories. The pipeline grew in every territory except for PAC during Q3. The number of studies being conducted is down from last year, but this is partly due to an increase in direct offers which is not currently captured in the Program Activity table. The rate of completed projects through three quarters is higher, due to increased activity in the Small Industrial track.

PGE

- The adjusted pipeline in PGE territory is at 86% of stretch goal. The pipeline grew during Q3, but not in line with short cycle expectations. Given historical trends, we look to be ending just above the conservative goal. Spending to date is in alignment with budget expectations.

PAC

- The adjusted pipeline in PAC territory is at 73% of stretch goal. The project pipeline shrank slightly during Q3 which is not in line with historical trends. The program is investigating possible reasons, including direction to the PDC's earlier this year when PAC looked hot that could have moderated outreach, as well as, the Kick-Start Bonus driving commitments to earlier in the year. Also, the program pushed for better forecasting, moving projects to next year's pipeline earlier than before, complicating the applicability of historical expectations. We will continue to push hard in this territory through the end of the year. Spending to date is in alignment with budget expectations.

NWN

- The adjusted pipeline in NWN territory is at 81% of stretch goal. The pipeline grew during Q3, but not quite in line with historical trends. Savings with Industrial DSM customers is strong, but continues to lag with customers paying the public purpose charge. Incentive spending to date is lower than expected for the therm savings achieved.

CNG

- CNG's pipeline remains robust, at 102% of stretch goal, with a small number of fairly large projects moving through construction now. Confidence is high that the program will achieve stretch goal in CNG territory in 2012. Spending to date is in alignment with expectations.

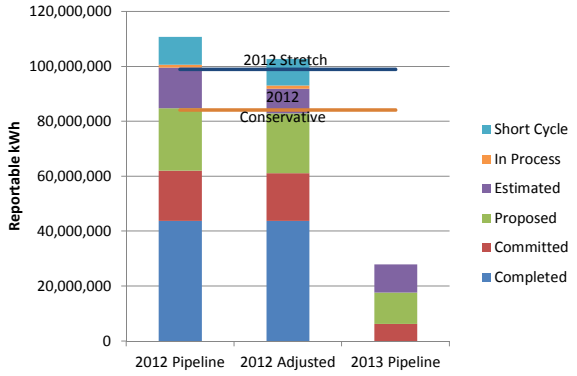
Commercial Programs Summary

October 1, 2012

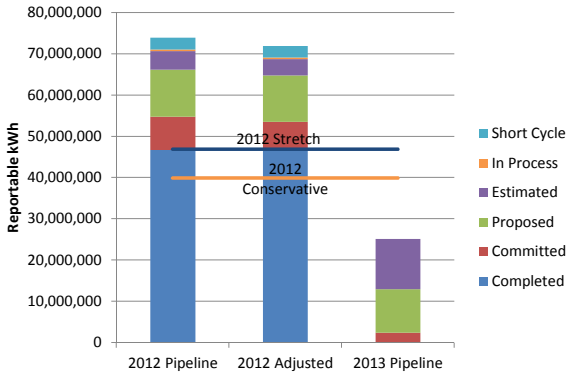
Commercial Sector		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	43,764,489	46,717,636	876,501	67,833
	To date % of Conservative goal	52%	117%	59%	49%
	To date % of stretch goal	44%	100%	50%	42%
Context	Historical % of actual accomplishment	42%	43%	44%	32%

Data included in this dashboard are preliminary and represent the best available data at this time. Energy Trust annual and quarterly reports to the Oregon Public Utility Commission contain the official Energy Trust data. All OPUC reports are published online at www.energytrust.org.

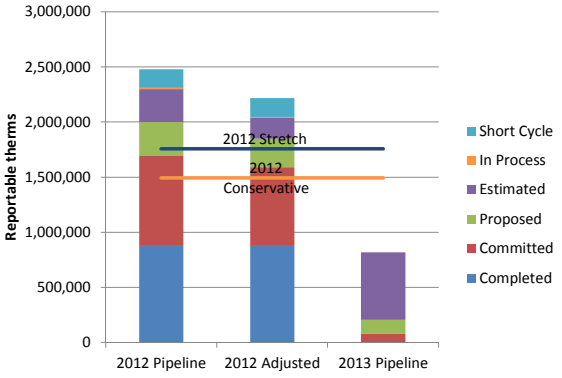
PGE Savings Pipeline 2012-2013



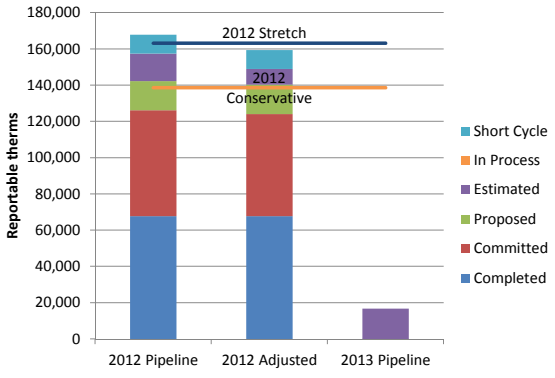
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



2012 Adjusted Pipeline percent of Stretch Goal	
PGE: 104%	**PAC:** 154%
NWN: 126%	**CNG:** 98%

Special Considerations:

Overall

- The Sector is on Track to exceed Stretch Goal for PGE, Pacific Power and NWN.
- The Sector is on Track to exceed Conservative Goal in CNG and is working to close the gap to Stretch with a focus on Roof-Top Tune-Ups, and Steam Traps in Existing Buildings.
- The Existing Buildings Kick-Start Bonus (KSB) offer contributed significantly to the 2012 project pipeline with over 1,100 projects qualifying across all utilities. Many eligible projects will be closing in 2012 contributing significantly towards achieving the Stretch Goals.
- The New Buildings program has achieved stretch goals for both electric utilities. Gas savings are adding up to be extremely close to the stretch goal. Large projects are bringing in more electric savings this year, as indicated in Q2. Gas savings improved over Q2 by about 113,000 therms, adding a high level of confidence to the pipeline.
- Oregon has seen unprecedented growth in data centers over the past few years, a trend we see continuing. In response the New Buildings Program Launched a new data center offer, that will streamline the NB process, and 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 sector 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 over 30 school districts; 10 of these districts have committed to complete projects by the end of 2012.
- Multifamily has deepened outreach efforts focusing on cultivating existing relationships with decision makers at top property management. In addition, focus on direct install, custom measures, and mid stream incentives has put us ahead of historic accomplishments with lower incentive spending than anticipated.
- Multifamily is continuing work with local, regional and national organizations to develop and deploy an on-bill financing pilot called MPower Oregon.
- The Sector's Strategic Energy Management Initiative is off to a strong start and is expected to bring in nearly 7 million kWh and 130,000 therms in 2012.

PGE

- The Existing Buildings program is currently forecast to deliver 93% of the stretch goal. Program staff is pushing hard to close the gap with a focus on grocery, hospital and hotel sectors as well as lighting projects at Auto dealerships, support for Cool Schools, and an additional push for PC Power management and server virtualization.
- The New Buildings goal has been achieved and program staff have high confidence in the savings currently under review, expecting to bring New Buildings 40 percent beyond the stretch goal. Large projects led savings results this year, including three hospitals and a number of small commercial projects.
- Multifamily results through Q3 are ahead of historic accomplishments due to increased custom and prescriptive savings that were brought into the pipeline since the end of Q2, at which time the program was forecast to exceed only conservative goal.

PAC

- The Existing Buildings program is in a position to exceed the 2012 Stretch goal and budget for Pacific Power with the current forecast indicating that the program will achieve 121% of the stretch goal. Staff informed the Energy Trust board that the program may exceed the incentive budget by up to $934,000 acquiring additional savings. The program is working to actively manage projects and studies so that this increased budget is not exceeded.
- New Buildings is 220% beyond goal mostly due to a large project that was under engineering review in Q2 and closed this quarter. Additional savings will come through small commercial projects.
- Existing Multifamily achieved results through Q3 already exceed stretch goal at 104%. This compares to the historic savings to goal results of 44%.

NWN

- The Existing Buildings custom project pipeline was strong and the Kick-Start Bonus added another 57 projects to the pipeline. Roof-Top Tune-up (RTU) activity has picked up substantially this year putting the program in a position to achieve 147% of the 2012 stretch goal.
- New Buildings is now within 2.5 percent of the stretch goal. Savings increased from last quarter adding another 100,000 therms expected to complete in 2012. Program staff continue to drive increased results by focusing on quick-turn opportunity with measures that are simple and cost-effective for customers to install that could bring the program to meet stretch goal.
- A large, custom MF project with a key affordable housing agency that was initiated in 2010 and struggled to obtain financing throughout 2011 and 2012. After extensive efforts by Energy Trust to assist this project in obtaining financing the project is re-energized and is expected to complete in 2014.
- NWN DSM projects in the pipeline are expected to achieve 337% of the stretch goal at 104% of the budget.

CNG

- The Existing Buildings Kick-Start Bonus had a less substantial impact in CNG territory with only 4 projects leveraging the bonus. Nevertheless, the program is presently on-track to meet the Conservative Goal with the current forecast indicating the program will yield 95% of the stretch goal. Program staff is working to close the gap on the goal by pushing Roof-top Tune-ups in the Ontario/Baker City Area, providing direct installs for steam traps in schools, and working with an engineering firm in the Bend market who may have leads on additional custom projects.
- New Buildings is within less than a percent of the stretch goal. Savings increased from last quarter by 3,000 therms. Earlier this year savings were forecast to exceed stretch goal until a project decided to use propane which reduced the forecast by about 20,000 therms. The program will drive for more savings by focusing on small commercial projects. Currently, forecasted savings are fairly certain with only 5 percent remaining in the estimated project status.

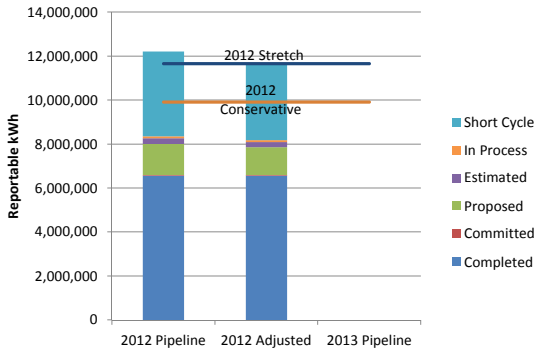
Existing Multifamily Summary

October 1, 2012

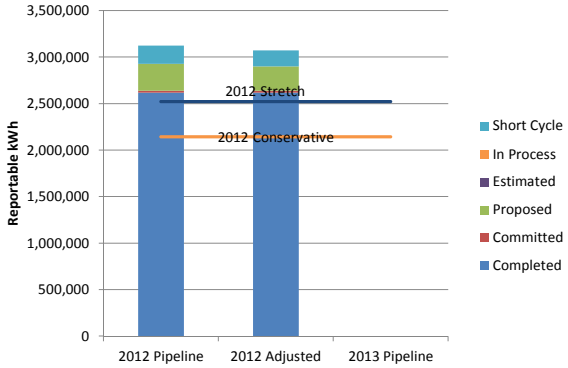
Program: Existing Multifamily		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	6,572,247	2,620,579	66,576	2,846
	To date % of Conservative goal	66%	122%	49%	0%
	To date % of stretch goal	56%	104%	42%	0%
Context	Historical % of actual accomplishment	45%	44%	48%	0%
Budget	To Date % of Incentive Budget Spent	40%	83%	23%	0%

Data included in this dashboard are preliminary and represent the best available data at this time. Energy Trust annual and quarterly reports to the Oregon Public Utility Commission contain the official Energy Trust data. All OPUC reports are published online at www.energytrust.org.

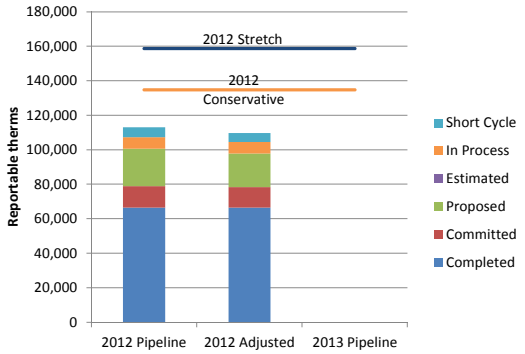
PGE Savings Pipeline 2012-2013



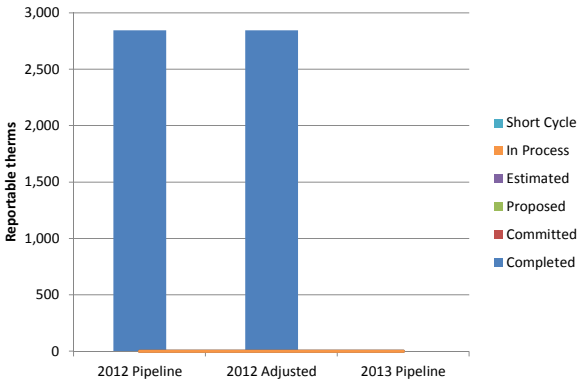
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



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 projected to make up 60-70% of the overall electric stretch goal for 2012. This targeted level of contribution is down from previous years.
- 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 have deepened the focus on cultivating existing relationships with decision makers at top property management and affordable housing agencies to go access the savings opportunities identified through past direct install and building assessments.
- During Q3 Existing Multifamily continued to integrate assisted living, memory care centers and retirement living communities into the normal program focus. This integration into our normal outreach has already brought in savings through direct install, prescriptive and custom savings tracks by Q3.
- The multifamily weatherization market continues to be negatively impacted by the loss of BETC and the increased technical requirements announced in the first opportunity announcement that opened in Q3 2012.

Q3 Accomplishments

- Using the learning's from the HE Clothes Washer mid-stream buy-down promotions, an RFP targeted at key regional appliance distributors was developed to influence the market to purchase energy-efficient refrigerators. Out of this process three regional appliance distributors were selected with the promotion officially beginning October 1.
- The Common Area Lighting track continues to increase its contribution to overall electric savings achievement with the track forecast to bring over 2M kWh in 2012 and build a considerable pipeline into 2013.
- Work continued with local, regional and national organizations to develop and deploy an on-bill repayment pilot called MPower Oregon throughout Q3 with a focus on a streamlined audit process and pipeline development for master metered buildings to be served in Phase I of the pilot.

How we are positioning the program to achieve savings.

Overall:

- The HE Clothes Washer mid-stream buy-down promotion comes to an end at the end of Q4, and has seen modest success in 2012. An RFP is being developed to continue the promotion into 2013 and is targeted at increasing the number of regional appliance distributors participating. The RFP will be released in late Q4.
- A comprehensive lighting pilot targeted at memory care facilities continued its outreach to fill enrollment and is expected to bring three projects in PGE territory during 2012.

PGE

- PGE results through Q3 show completed projects at 56% of stretch goal. Historically, achievement at the end of Q3 is 45%. 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 stretch goal. This includes many custom and prescriptive savings that were brought into the pipeline since the end of Q2 at which time the program was forecast to exceed only conservative goal.
- 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. The first capital projects from this initiative are expected to be completed in Q1 2013.

PAC

- Existing Multifamily achieved results through Q3 already exceed stretch goal at 104%. This compares to the historic savings to goal results of 44%.
- When year-to-date achievement is combined with forecast and short-cycle savings the program is on track to exceed stretch goal for 2012 and business development staff has shifted active outreach from direct-install efforts to focus on developing long-term opportunities with key customers to encourage 2013 pipeline development.

NWN

- Results through Q3 for NW Natural show completed projects at 42% of stretch goal. This compares to the historic savings to goal results of 48%.
- Program staff saw a sharp rise in therm savings in Q3 which are typically the warmer quarters of the year when large custom and prescriptive HVAC projects are typically completed and processed.
- The custom track continued to see increased participation and enrollment which will lead to healthy pipeline development and savings achievement into 2013.
- When year-to-date achievement is combined with forecast and short-cycle savings the program is still short of the conservative savings goal.
    - This is directly related to a large, internally managed, custom project with a key affordable housing agency that was initiated in 2010 and struggled to obtain financing throughout 2011 and 2012. After extensive efforts by Energy Trust to assist this project in obtaining financing the project is re-energized and is expected to complete during Q1 2014.
- Program staff continued efforts with Planning and Evaluation to add and modify gas measures to diversify program offerings, evaluate potential impacts regarding the uncertainty around gas avoided costs and accelerate gas efficiency projects for the remainder of 2012 and into 2013.

CNG

- The program did not have associated savings goals or incentive budget for this service territory in 2012 it has still served customers of CNG, bringing in over 2,800 therms through direct install and prescriptive projects.
- As a result of the increased 2012 customer interest in CNG service territory and the impending move of small multifamily properties (2-4 attached units) to the Existing Multifamily the program has included modest savings goals and associated budget for CNG in 2013.

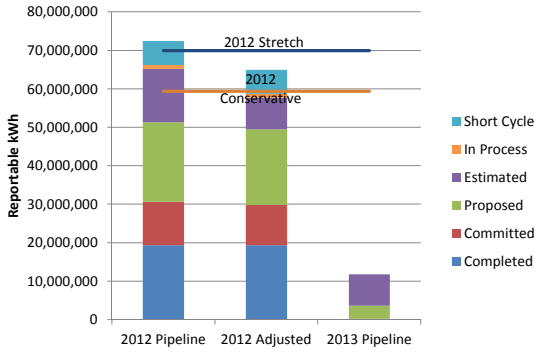
Existing Buildings Summary

October 1, 2012

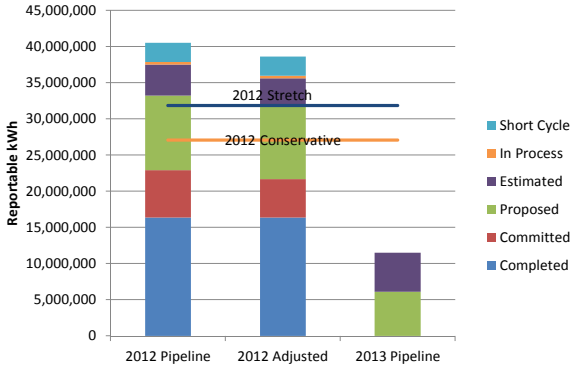
Program: Existing Buildings		PGE	PAC	NWN	CNG
Achievement	2011 Achievement to Date (Rpt kWh or therm)	19,367,429	16,360,715	499,661	43,255
	To date % of Conservative goal	33%	60%	53%	43%
	To date % of stretch goal	28%	51%	45%	36%
Context	Historical % of actual accomplishment	41%	45%	38%	21%
Budget	To Date % of Incentive Budget Spent	25%	51%	61%	31%

Data included in this dashboard are preliminary and represent the best available data at this time. Energy Trust annual and quarterly reports to the Oregon Public Utility Commission contain the official Energy Trust data. All OPUC reports are published online at www.energytrust.org .

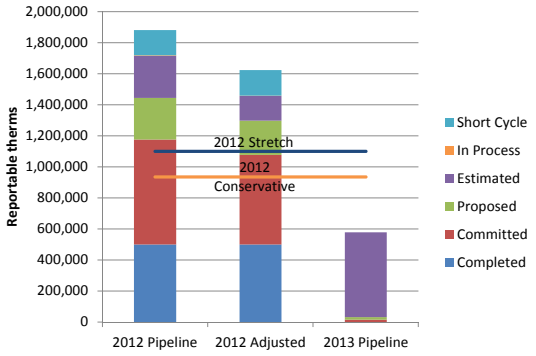
PGE Savings Pipeline 2012-2013



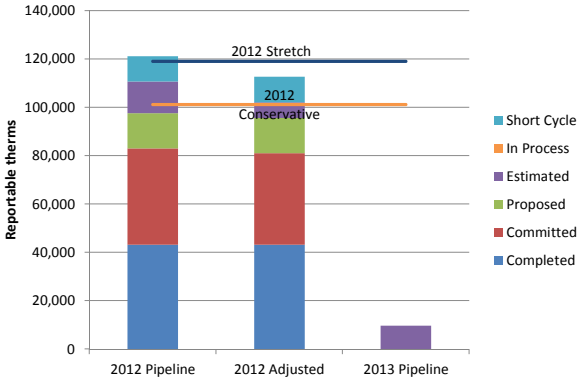
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

Overall:

- The Kick-Start Bonus (KSB) offer, a 20% incentive increase for lighting and custom projects, contributed significantly to the 2012 project pipeline. In order to be eligible for the bonus projects had to have an incentive offer from the program by June 29th. Many of these project will be closing in 2012 contributing significantly to the total savings needed to achieve the Stretch Goals.
- The program has been collaborating closely with ODOE on the State's Cool Schools initiative by providing outreach and planning services to schools to help them leverage ODOE's SB 1149 schools funds for K-12 schools. To date Existing Buildings has been in contact with over 30 school districts; 10 of these districts have committed to complete projects in 2012 contributing to significant savings.
- Operations-based savings from the Strategic Energy Management pilot will contribute to total program savings in 2012. Savings from the first year of the initial SEM cohort will be recognized in Q4 with an average of 3-5% gas and electric savings expected from each participant.
- Existing Buildings program is in the midst of a transition of the PMC contract from Lockheed Martin to ICF that will be finalized at the beginning of 2013.
- Existing Buildings continues to use successful customer stories to communicate the business value of energy-efficiency investment.

PGE

- The program saw a significant surge in projects entering the pipeline as a result of the KSB end date of June 29, 2012; 681 projects are eligible for KSB. The program is on-track to deliver 93% of the stretch goal. Program staff are pushing to stretch goal by year-end through a focus on grocery, hospital and hotel sectors as well as encouraging Cool Schools projects to complete in 2012. Extra staff have been brought in to focus on lighting projects with an emphasis on Auto-dealers and increased outreach and marketing for previously untouched customers. An additional push for PC Power management and server virtualization projects should contribute additional savings.
- A total of 1077 PGE projects have been completed in 2012 with 397 projects completing in Q3. Significant projects include a custom building control project for an office building producing savings of 332,000 kWh and a data center virtualization project achieving 115,000 kWh in energy savings.
- Energy Trust has been collaborating effectively with PGE's business outreach team on initiatives including the auto dealer/exterior lighting initiative, as well as several community-initiated business energy challenges and the launch of Energy Tracker for Business.

PAC

- At the conclusion of the Kick-Start Bonus, 420 projects are eligible for the bonus and the program has a pipeline full of custom and lighting projects. The program is in a position to exceed the 2012 Stretch goal and budget for PacifiCorp with the current forecast indicating that the program will achieve 121% of the stretch goal.
- A total of 689 PAC projects have been completed in 2012 with 190 projects completing in Q3. Significant projects include a custom HVAC project for a resort producing savings of 150,000 kWh and another custom HVAC project achieving 326,000 kWh in energy savings.
- Energy Trust has contributed customer success stories to Pacific Power's customer newsletters on a quarterly basis, and coordinated with Pacific Power's marketing staff on ads featuring customers.

NWN

- The custom project pipeline was strong and the Kick-Start Bonus added another 37 projects to the pipeline. Roof-Top Tune-up (RTU) activity has picked up substantially this year putting the program in a position to achieve 147% of the 2012 stretch goal. The program will be actively managing additional uptake on Custom Projects and studies in order to manage the commercial program portfolio to achieve the Commercial Sector NWN stretch goal.
- A total of 619 NWN projects have been completed in 2012 with 237 projects completing in Q3. Significant projects include a custom HVAC project for a City of Portland park producing savings of 11,780 therms and another custom hospital project achieving 10,285 therms in energy savings.

CNG

- The Kick-Start Bonus had a lower impact in CNG territory with only 4 projects leveraging the bonus. Nevertheless, the program is presently on-track to reach 95% of the stretch goal. PMC program staff continues to push Roof-top Tune-ups in the Ontario/Baker City Area, provide direct installs for steam traps in schools and work with an engineering firm in the Bend market on additional custom projects.
- A total of 42 CNG projects have been completed in 2012 with 7 projects completing in Q3. Significant projects include a custom HVAC project for a resort with savings of 5,700 therms and a RTU tune-up project achieving 2,374 therms in energy savings.

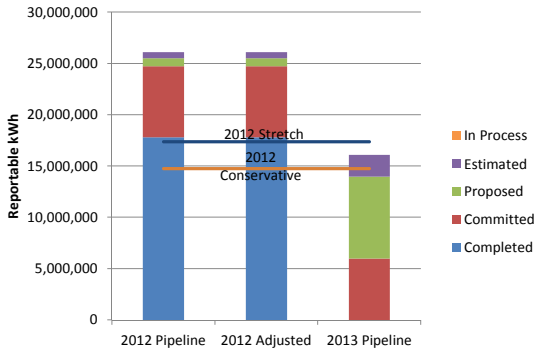
New Buildings Summary

October 1, 2012

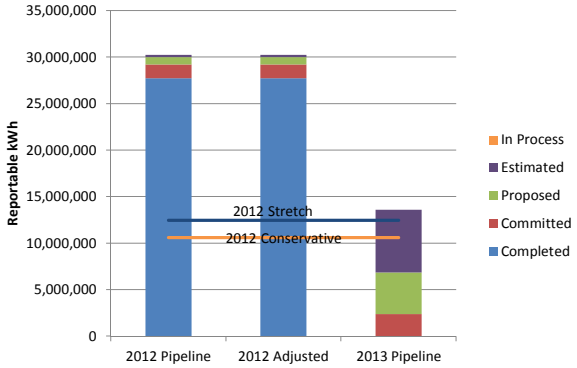
Program: New Buildings		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	17,824,813	27,736,342	310,265	21,732
	To date % of Conservative goal	121%	262%	73%	58%
	To date % of stretch goal	103%	222%	62%	49%
Context	Historical % of actual accomplishment	46%	41%	55%	57%
Budget	To Date % of Incentive Budget Spent	74%	71%	49%	48%

Data included in this dashboard are preliminary and represent the best available data at this time. Energy Trust annual and quarterly reports to the Oregon Public Utility Commission contain the official Energy Trust data. All OPUC reports are published online at www.energytrust.org.

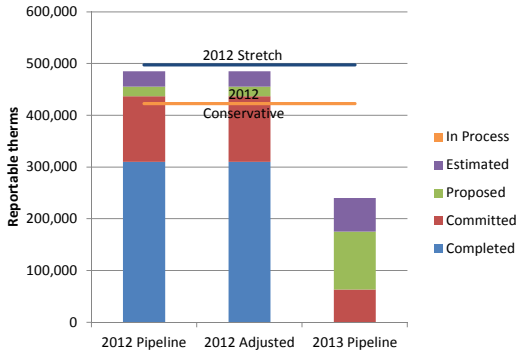
PGE Savings Pipeline 2012-2013



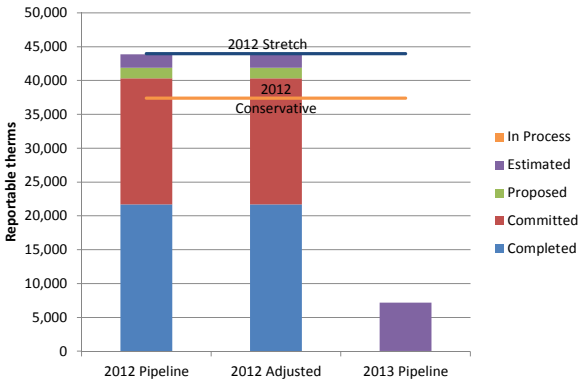
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

Overall

- The New Buildings pipeline held strong across all four utilities this year. Stretch goals have been achieved for both electric utilities. Gas savings are adding up to be extremely close to the stretch goal. Overall there is high confidence in achieving remaining savings so no adjustment factors were applied. Gas savings improved over Q2, adding a high level of confidence to the pipeline, most savings are coming from restaurants and the program's success in driving quick-turn savings, in addition to multifamily that was underrepresented in Q2 due to an error in the report. Large projects are bringing in more electric savings this year, as indicated in Q2. The year-over-year growth is significant: from 2005 to 2007 the electric savings grew 250 percent, gas savings grew by 1,700 percent; from 2007 to 2009 savings held strong averaging 20,000,000 annual kohl and 430,000 annual therms before nearly doubling electric savings and achieving 163 percent more therms in 2010 – our biggest year for gas savings. We expect 2012 to be our biggest year for electric savings, hitting a record of 45,600,000 kWh – due to aggressive savings from data centers, small commercial and a few large custom projects.
- Outreach Managers enrolled 80 new projects in Q3; total year-to-date enrollment stands at 275 projects and we estimate enrolling a total of 360 projects by year-end. New Buildings also launched two new initiatives targeting small commercial and data centers.

Small Commercial Solutions

Based on the successful results of the 2009-2011 Small Commercial Efficiency Pilot, a mainstream small commercial offering was developed to more comprehensively serve the needs of the small commercial market. The offers – called Market Solutions – 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. By driving 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 Solutions

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. It 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

- The goal has been achieved and program staff have high confidence in the savings currently under review, expecting to bring New Buildings 40 percent beyond the stretch goal. Large projects led savings results this year, including three hospitals and a number of small commercial projects. The big change that brought us to reach the stretch goal was in moving projects that were under engineering review in Q2 to completion in Q3.
  - Most savings achieved this quarter came from three new multifamily buildings (25%) and five new public sector buildings (31%). There were also two custom and two additional LEED projects, plus a few dozen more prescriptive projects.

PAC

- New Buildings is 220% beyond goal mostly due to a large project that was under engineering review in Q2 and closed this quarter. Additional savings will come through small commercial projects. Looking ahead at 2013, the pipeline has over 13 million kWh pushing past this year's goal and is expected to return to normal savings levels from small commercial unless another large project is identified.
  - Most savings achieved this quarter came from a large LEED-certified office building (32%) and five grocery/big box stores (36%) in addition to a couple dozen prescriptive projects.

NWN

- New Buildings is now within 2.5 percent of the stretch goal. Savings increased from last quarter adding another 100,000 therms expected to complete in 2012. This positive shift is from several projects closing with higher savings than expected and another three are closing ahead of schedule. Program staff continue to drive increased results by focusing on quick-turn opportunities with measures that are simple and cost-effective for customers to install that could bring the program to meet stretch goal. 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.
  - Most savings achieved this quarter came from two LEED-certified buildings (22%) and five new schools (27%), and a couple dozen prescriptive projects.

CNG

- New Buildings is within less than a percent of the stretch goal. Savings increased from last quarter by 3,000 therms. Earlier this year savings were forecast to exceed stretch goal until a project decided to use propane which reduced the forecast by about 20,000 therms. The program will drive for more savings by focusing on small commercial projects. Currently, forecasted savings are fairly certain with only 5 percent remaining in the estimated project status.
  - Most of the therm savings achieved this quarter came from two new schools (75%). There were also two projects that completed the Core Performance pilot, and a handful of additional prescriptive projects.

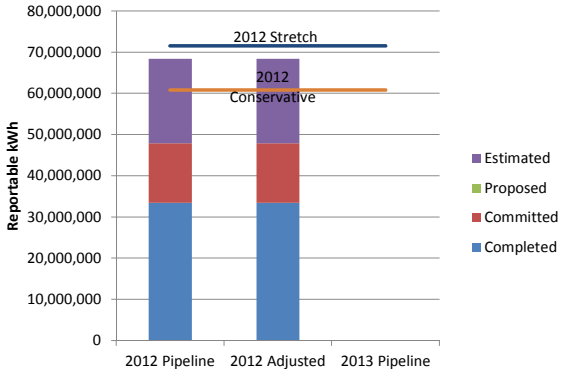
Residential Programs Summary

October 1, 2012

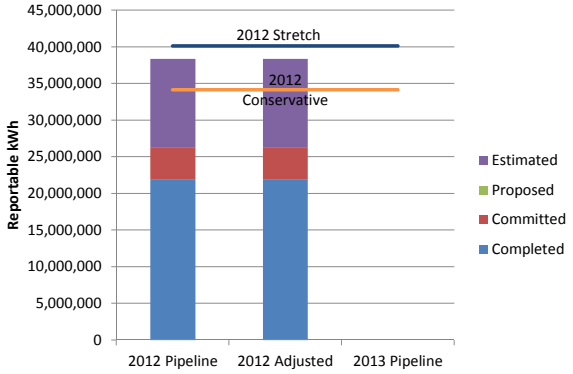
Residential Sector		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	33,434,314	21,965,895	964,534	47,580
	To date % of Conservative goal	55%	64%	47%	37%
	To date % of stretch goal	47%	55%	40%	32%
Context	Historical % of actual accomplishment	66%	60%	67%	47%

Data included in this dashboard are preliminary and represent the best available data at this time. Energy Trust annual and quarterly reports to the Oregon Public Utility Commission contain the official Energy Trust data. All OPUC reports are published online at www.energytrust.org.

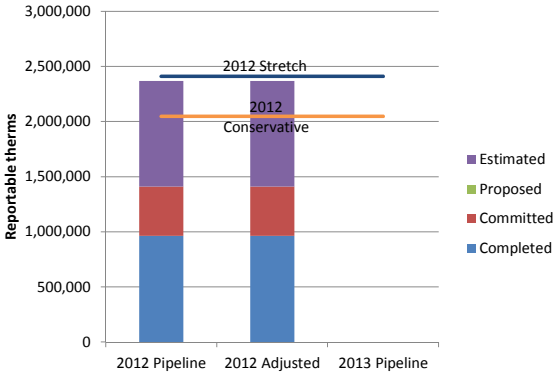
PGE Savings Pipeline 2012-2013



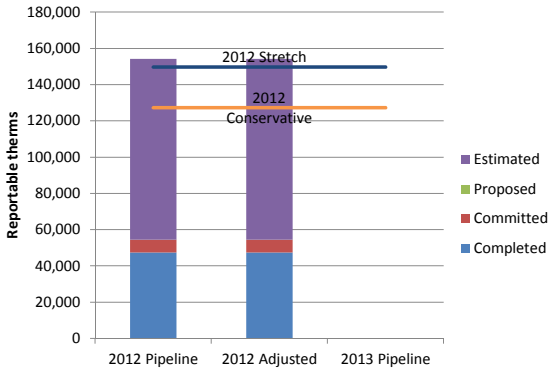
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



2012 Adjusted Pipeline percent of Stretch Goal	
PGE: 96%	**PAC:** 96%
NWN: 98%	**CNG:** 103%

Special Considerations:

Overall

- Based on performance to-date, Existing Homes is currently forecasted to exceed stretch goals across all utilities.
- 763 EPS new construction homes have been completed year to date (117% of goal).
- 125 homes came through the new construction air sealing pilot, which is designed to work with insulation and drywall subcontractors to decrease the air leakage in non-program homes.
- Ductless Heat Pumps along with Gas Fireplaces continue to be key single measure drivers across each utility for Existing Homes.
- Activity for retail measures (lighting, showerheads, clothes washers, refrigerators and fridge recycling) are down this year vs. last. Although national appliance sales are up, as a state, Oregon is lagging behind in most consumer sales metrics. Additionally, ODOE's elimination of the state tax credit for energy efficient appliance is suspected to play a role.
- Weatherization measures continue to see upward swings after a slow Q1 & Q2.
- The Contact Center received nearly 12,000 inbound calls during Q3, which is up 25 percent compared to the same quarter last year.
- Existing Homes received 4,220 applications, 1,829 were for Single Family incentives, including Home Performance.
- Home tour season in full swing, in total for 2012 home tour season we had 55 EPS homes as a part of 9 home tours across the state.
- Developed print-on demand website for Existing Homes trade allies to order and customize Energy Trust marketing collateral.

- Uptake on water heating measures continues to be slow across all utilities through Q3. However, Energy Star water heaters are gaining ground. At least two high volume plumbing companies are using internal spiff payments to their sales people when they up-sell to Energy Star water heaters.

PGE

- Excluding OPower savings, Existing Homes has achieved 51 percent of the 2012 stretch goal through Q3.
- For Q4 the Products program is planning on a media outreach push around refrigerator recycling, working with PGE to increase community office giveaways, and looking into opportunities for targeted LED buy-down at retail as potential ways to increase savings in 2012.
- For Products and Homes program incentives and savings are on track for conservative case, with stretch case being more challenging based on retail measures activity being down (lighting, clothes washers, and refrigerators, as well as refrigerator recycling).
- Four newsletters promoted Energy Saver Kits, ductless heat pumps, weatherization and water heaters.
- Existing Mobile Homes has only achieved 31 percent of its 2012 budget goal through Q3 and continues to see slow production; a fall Energy Saver Kit campaign will achieve this savings variance in the existing home program.
- The 6 month Instant Incentive test with Sears wrapped up at the end of August. Results will be available in Q4.
- Through Q3 Ductless Heat Pumps continue to be the highest contributing non-ISM* measure in existing homes, with 404 installs and over 1.4M kWh in savings.

** ISM – Instant savings measure (i.e., CFL, aerator, shower head)*

PAC

- Through Q3, Existing Homes has achieved 67 percent of the stretch savings goal for Pacific Power and is on target to exceed the overall 2012 goal.
- Six EPS homes featured in the Central Oregon Builders Association home tour (July).
- Fifteen thousand postcards were distributed to promote the Heat Pump Advanced Controls pilot within Pacific Power territory.
- For Q4 the program is planning on a media outreach push around refrigerator recycling, coordinating with PAC staff on opportunities to work with Community Action Agencies, and looking into opportunities for targeted LED buy-down at retail as ways to increase savings in 2012.
- Bill insert created for refrigerator recycling (Sept).
- During Q3 Single Family and Existing Mobile Homes tracks made up 60 percent of total savings within the existing homes program.
- With the exception of Duct Insulation, weatherization measures have continued to show a strong rebound after a slow start in 2012. The program is forecasting these measures will meet budgeted savings targets.

- Ductless heat pump installations have achieved 79% of the annual goal and continue to show strong savings potential through the rest of the year.

NWN

- Through Q3, Existing Homes has achieved 59 percent of the stretch savings goal and is on target to exceed the 2012 NW Natural savings goal.

- During Q3 weatherization measures contributed 56 percent of total savings. The next highest contributor was equipment which contributed 18 percent.

- The difference between incentive budget and savings in New Homes and Products is driven by 3 factors; (1) New homes are way up (higher cost savings) (2) Retail showerheads are way down (lower cost savings) (3) Some dollars were shifted from delivery to incentives as part of the transition in outreach roles.

- The New Homes program and the Portland HBA worked at NW Natural's Street of Dreams home tour handing out EPS information and talking to consumers about energy efficiency.
- Forty-two thousand postcards were mailed to targeted customers to promote weatherization.
- The Existing Homes program mailed Fifteen thousand postcards to targeted customers to promote solar water heating.
- In Existing Homes, after insulation, Gas Fireplaces contribute the second most savings as a single measure to core savings in 2012. As of the end of Q3 2012, there have been 655 gas fireplace installations which is 31% higher than in 2011.
- New Homes are expecting to exceed the incentive budget by 122% ($250,000) driven by an upturn in the housing market.
- NWN is forecast to come in just under stretch case due to lower than anticipated retail activity. The products program will look for opportunities for showerhead and shower wand promotions through targeted retail channels in Q4 in an attempt to reach best case savings goals.

CNG

- New construction homes are expecting to hit 115%-120% of stretch goal – driven by new homes volume that is higher than expected.
- 6 EPS homes were featured in the Central Oregon Green and Solar tour.
- Sixty-five thousand postcards were mailed to targeted customers to promote weatherization.
- Central Oregon Green and Solar tour to take place October 6th with at least six program homes on the tour.
- Clean Energy Works Oregon project activity is about 25% through Q3 compared to budget and it is forecasted to fall significantly short of goal; additional savings efforts have been created to offset the related savings variance.

Existing Homes Summary

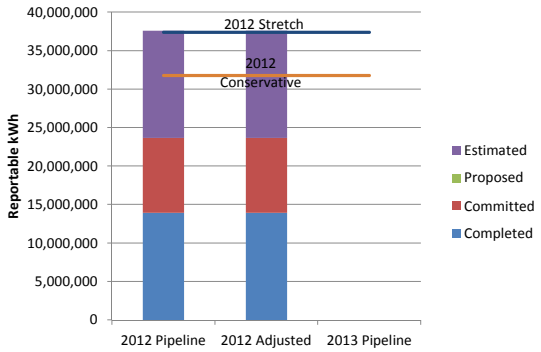
October 1, 2012

Program: Existing Homes		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	13,950,909	11,503,598	702,311	27,064
	To date % of Conservative goal	44%	78%	51%	37%
	To date % of stretch goal	37% *	67%	44% *	31%
Context	Historical % of actual accomplishment	69%	57%	68%	41%
Budget	To Date % of Incentive Budget Spent	50%	67%	47%	20%

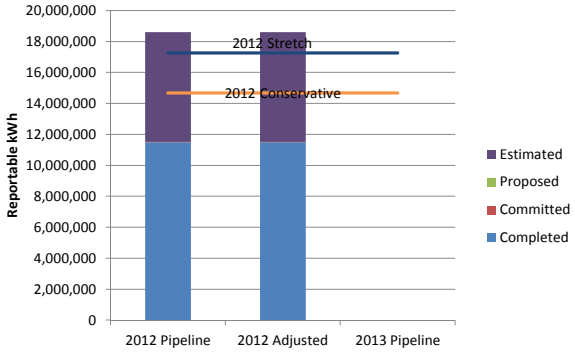
* OPOWER Pilot Savings achievement is committed and not yet recognized.

Data included in this dashboard are preliminary and represent the best available data at this time. Energy Trust annual and quarterly reports to the Oregon Public Utility Commission contain the official Energy Trust data. All OPUC reports are published online at www.energytrust.org.

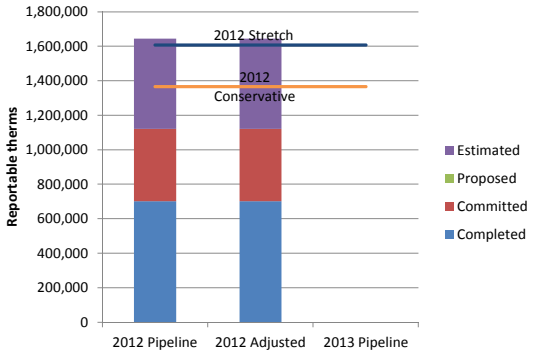
PGE Savings Pipeline 2012-2013



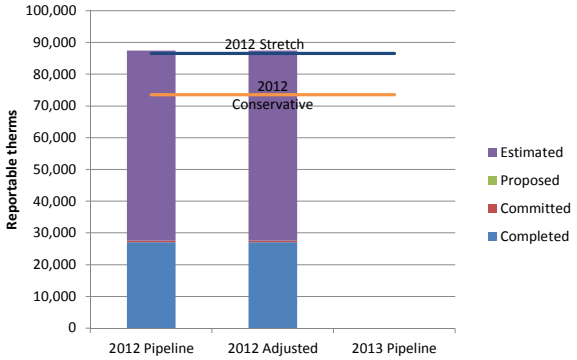
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

Overall:

- Based on performance to-date, Existing Homes is currently forecasted to exceed stretch goals across all utilities.
- Weatherization measures continue to see upward swings after a slow first quarter.
- Ductless Heat Pumps along with Gas Fireplaces continue to be key single measure drivers across each utility.
- Uptake on water heating measures continues to be slow across all utilities through Q3. However, Energy Star water heaters are gaining ground. At least two high volume plumbing companies are using internal spiff payments to their sales people when they up-sell to Energy Star water heaters.
- Developed and launched Existing Single Family Webform for homeowners and contractor use.
- Developed print-on demand website for trade allies to order and customize Energy Trust marketing collateral.
- Home Performance with ENERGY STAR contractors have completed a total of 924 projects (635 CEWO projects and 289 standard market September 30), which is more than the first 3 quarters in any previous year.

PGE

- Excluding OPower savings, Existing Homes has achieved 51 percent of the 2012 stretch goal through Q3.
- Existing Mobile Homes has only achieved 31 percent of its 2012 budget goal through Q3 and continues to see slow production due to encountering higher saturation rates than originally estimated; a fall Energy Saver Kit campaign will close this savings variance.
- Through Q3 Ductless Heat Pumps, with the exception of Energy Saver Kits, continue to be the highest contributing measure, with 404 installs and over 1.4M kWh in savings.
- Savings from windows projects have already exceeded their savings goal by over 200%.

PAC

- Through Q3, Existing Homes has achieved 67 percent of the stretch savings goal for Pacific Power and is on target to exceed the overall 2012 goal.
- During Q3 Single Family and Existing Mobile Homes tracks made up 60 percent of total savings.
- With the exception of Duct Insulation, weatherization measures have continued to show a strong rebound after a slow start in 2012. The program is forecasting these measures will meet budgeted savings targets.
- Ductless heat pump installations have achieved 79% of the annual goal and continue to show strong savings potential through the rest of the year.
- Savings from weatherization projects are trending well. Year-to-date, savings from weatherization has achieved 74% of budgeted savings.

NWN

- Through Q3, Existing Homes has achieved 59 percent of the stretch savings goal and is on target to exceed the 2012 NW Natural savings goal.
- During Q3 weatherization measures contributed 56 percent of total savings. The next highest contributor was equipment which contributed 18 percent.
- After insulation, Gas Fireplaces contribute the second most as a single measure to core savings in 2012. As of the end of Q3 2012, there has been 655 gas fireplace installs which is 31% higher than in 2011.
- We have funded 208 furnaces through Savings Within Reach in 2012.

CNG

- Through Q3, Existing Homes has achieved 31 percent of the 2012 stretch goal. Although low, the program is forecasting to exceed the 2012 stretch savings goal.
- Through Q3 the Single-family track continue to contribute the highest percentage of year-to-date savings at 73 percent overall.
- Clean Energy Works Oregon project activity is only 25% of expectations through Q3 and will fall significantly short of goal; additional savings efforts through direct install measures and several custom small multifamily weatherization improvements have been created to offset the related savings variance.
- As of the end of Q3, the Existing Mobile Homes Program Track has outperformed its forecasted year-to-date savings by 15%.
- Fifteen thousand postcards were mailed to targeted customers to promote gas fireplaces.

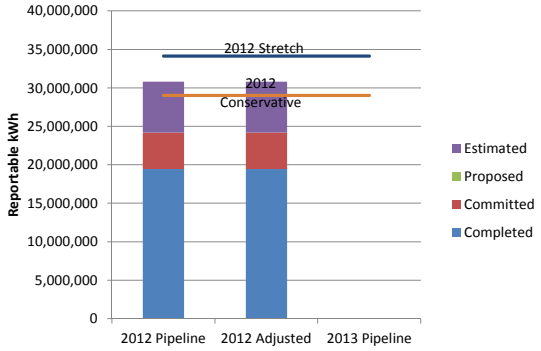
New Homes And Products Summary

October 1, 2012

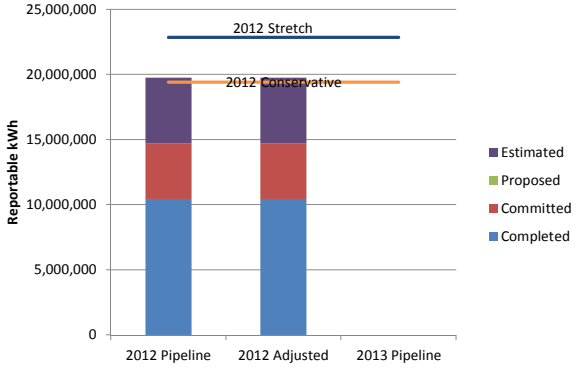
Program: New Homes & Products		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	19,483,405	10,462,297	262,222	20,515
	To date % of Conservative goal	67%	54%	38%	38%
	To date % of stretch goal	57%	46%	33%	33%
Context	Historical % of actual accomplishment	63%	61%	61%	61%
Budget	To Date % of Incentive Budget Spent	58%	51%	94%	53%

Data included in this dashboard are preliminary and represent the best available data at this time. Energy Trust annual and quarterly reports to the Oregon Public Utility Commission contain the official Energy Trust data. All OPUC reports are published online at www.energytrust.org.

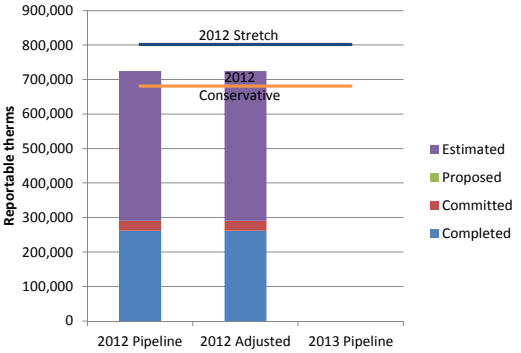
PGE Savings Pipeline 2012-2013



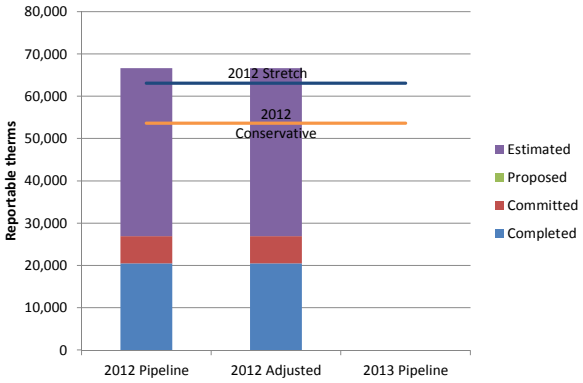
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

Overall:

- Electric and gas savings and incentives expected to be within stretch and conservative cases exceptions: NWN 120% of incentive budget and Cascade 107% of stretch goal.
- Activity for retail measures (lighting, showerheads, clothes washers, refrigerators and fridge recycling) are down this year vs. last. Although national appliance sales are up, as a state, Oregon is lagging behind in most consumer sales metrics. Additionally, ODOE's elimination of the state tax credit for energy efficient appliance is suspected to play a role.
- 763 Energy Performance Scores for new homes have been completed year to date, exceeding the program annual goal by 17%. The market penetration for EPS homes is on track with initial expectations, however new homes permits in 2012 are up 15% over 2011 and the intimal 2012 forecast. This increase has a larger impact on the gas utilities because 80 percent of Program homes are heated with gas as the primary fuel source.
- 125 homes came through the air sealing pilot in Q3, which is designed to work with insulation and drywall subcontractors to decrease the air leakage in non program homes. This is lower volume than expected, but activity should increase as more trade ally's are brought on board.
  - Home tour season in full swing, in total for 2012 home tour season we had 55 EPS homes as a part of 9 home tours across the state.
- Fall fridge recycling advertising (print, web, radio and TV) kicked off in August and developed word-of-mouth campaign for fridge recycling, including testimonials and referrals, for October launch.

PGE

- Incentives and savings are on track for conservative case, with stretch case being more challenging based on retail measures activity being down (lighting, clothes washers, and refrigerators, as well as refrigerator recycling).
- The 6 month Instant Incentive test with Sears wrapped up at the end of August. Results will be available in Q4.
- For Q4 the program is planning on a media outreach push around refrigerator recycling, working with PGE to increase community office giveaways, and looking into opportunities for targeted LED buy-down at retail as potential ways to increase savings in 2012.

PAC

- On track for conservative case – based on Retail measures activity being down (lighting, clothes washers, and refrigerators), as well as refrigerator recycling.
- Bill insert created for refrigerator recycling (Sept).
- For Q4 the program is planning on a media outreach push around refrigerator recycling, coordinating with PAC staff on opportunities to work with Community Action Agencies, and looking into opportunities for targeted LED buy-down at retail as ways to increase savings in 2012.
- 6 EPS homes featured in the Central Oregon Builders Association home tour (July).

NWN

- Expecting to exceed the incentive budget by 122% ($250,000) driven by an upturn in the housing market.
- The difference between incentive budget and savings is driven by 3 factors; (1) New homes are way up (higher cost savings) (2) Retail showerheads are way down (lower cost savings) (3) Some dollars were shifted from delivery to incentives as part of the transition in outreach roles.
- The program and the Portland HBA worked at NW Natural's Street of Dreams home tour handing out EPS information and talking to consumers about energy efficiency.
- Ran Smart Home Buyer campaign advertising to support home shows and drive consumer interest in ESP homes.

CNG

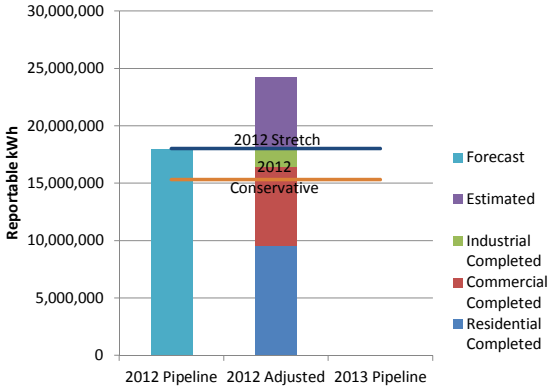
- Expecting to hit 115%-120% of stretch goal savings with the original incentive budget – driven by new homes volume that is higher than expected.
- 6 EPS homes featured in the Central Oregon Green and Solar tour.
- Central Oregon Green and Solar tour to take place October 6th with at least six program homes on the tour.
- Ran Smart Home Buyer campaign advertising to support home shows and drive consumer interest in ESP homes.

Market Transformation Summary October 1, 2012

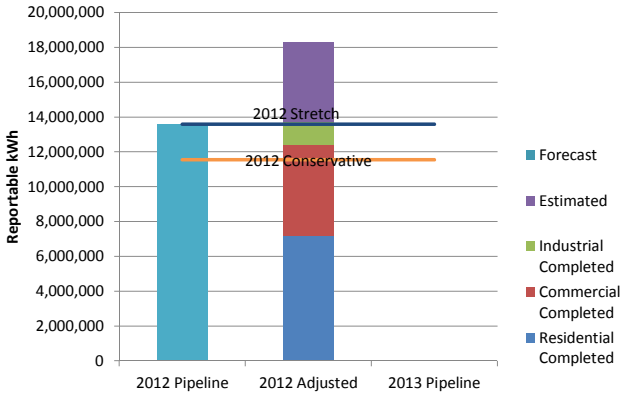
Program: Market Transformation		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	18,201,304	13,730,806	206,699	19,875
	To date % of Conservative goal	119%	119%	75%	88%
	To date % of stretch goal	101%	101%	64%	75%
Context	Historical % of actual accomplishment	84%	83%	78%	81%
Budget	To Date % of Incentive Budget Spent	N/A	N/A	N/A	N/A

Data included in this dashboard are preliminary and represent the best available data at this time. Energy Trust annual and quarterly reports to the Oregon Public Utility Commission contain the official Energy Trust data. All OPUC reports are published online at www.energytrust.org.

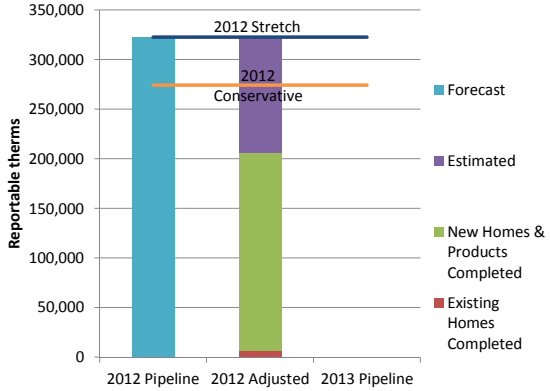
PGE Savings Pipeline 2012-2013



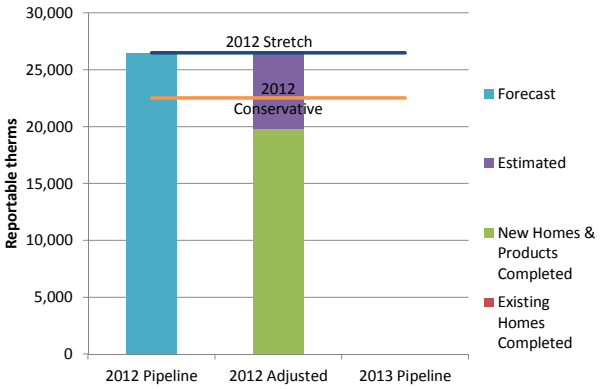
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



NEEA

- NEEA's forecast of savings from market transformation in 2012 has increased across the commercial and residential sectors.
  - In the residential sector, the electronics industry is forecasting higher TV sales, offsetting a reduction in the ductless heat pump initiative, where new market data shows lower saturation.
  - New market data shows that commercial desktop PC shipments are higher than earlier predicted. The forecast for Building Operator Certification has also increased, based upon expected enrollment figures.
  - In the industrial sector, delays have led to a reduction in savings expectations for small & medium industrial facilities. The forecast for NEEA's Food Processors initiative has also been decreased based upon a 3rd party review.
- These savings estimates are still early and subject to change, as NEEA works throughout the year and into 2013 to fine tune their savings estimates. NEEA will provide Energy Trust updates to these estimates in early November and again in early January as the 2012 program year is closed. Final savings values will be based upon the results of NEEA's 2012 Annual Report, released in mid-2013.